

Manager Tools Quick Guide

MANAGER TOOLS

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Set An Access Boston Delegate

If you will be away for a period, you can designate someone else to undertake pending tasks (approvals) within the Access Boston system in your absence.

1. Click on the link to '[Set An Access Boston Delegate](#)'

The screenshot shows the 'Edit Preferences' page in the ACCESS BOSTON system. The page has a dark blue header with the ACCESS BOSTON logo and navigation links: Home, My Work, Identities, Applications, Intelligence, and Setup. The main content area is white and contains the following elements:

- Forwarding User:** A dropdown menu with a question mark icon and a downward arrow.
- Start Forwarding:** A checkbox with a question mark icon.
- End Forwarding:** A checkbox with a question mark icon.
- Buttons:** A blue 'Save' button and a grey 'Cancel' button.

2. In the 'Forwarding User' field type the name or ID of the person who will be acting as your Delegate and select them from the list that appears.

3. Click the checkbox next to 'Start Forwarding' and choose a date (the ... button on the right allows you to choose from a calendar).

4. Click the checkbox next to 'End Forwarding' and choose a date there.

Important Note: If you want this delegation to be a permanent arrangement, simply choose a Start Date (and do not put in an End Date).

5. Click the 'Save' button to set your delegate.

Edit Preferences

Forwarding User

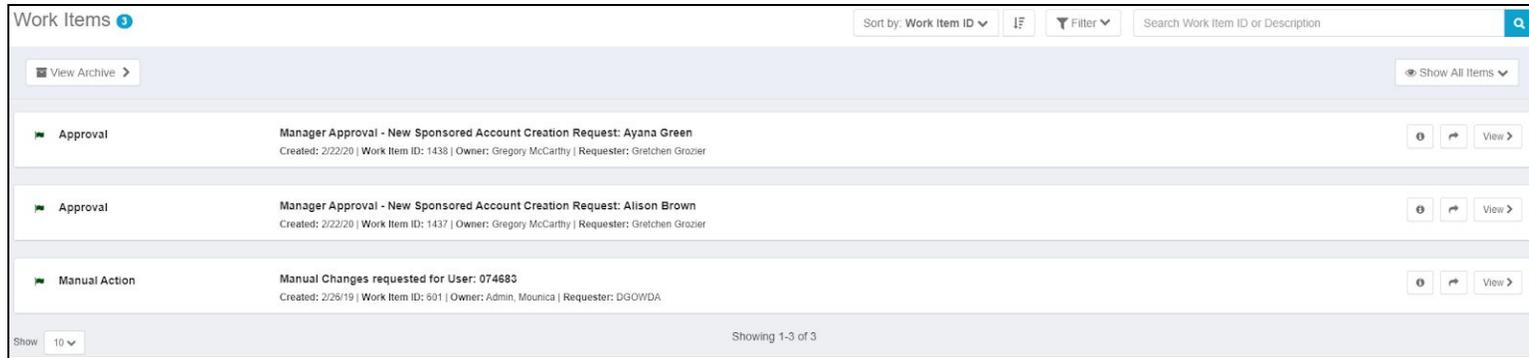
Start Forwarding

End Forwarding

My Access Boston Approvals

When you have pending approvals in the Access Boston system (for example: if someone you manage requests a Sponsored Account or if you are involved in an application approval request process) you can quickly access that information from the Access Boston Portal. But you will also get email notices from Access Boston to let you know you have an approval pending (a hyperlink will be included within the email).

1. Click on the link to 'My Access Boston Approvals'
2. Your Work Items page will open, find the item that you want to approve, then click on the View > button on the far right of that row



3. A window will open to allow you to review the details of the request and you will have the option to **Approve** [green thumbs up] or **Deny** [red thumbs down] the work item using the buttons on the right. Please note - if you reject an item you will need to provide comments as to why you are doing that (these comments are shared with the requestor).



Important note: certain approval work items have a time limit. For example, if you do not act upon a sponsored account approval request within 14 days it will time out.
The requestor will be notified if the work item expires.

